

FIG. 2

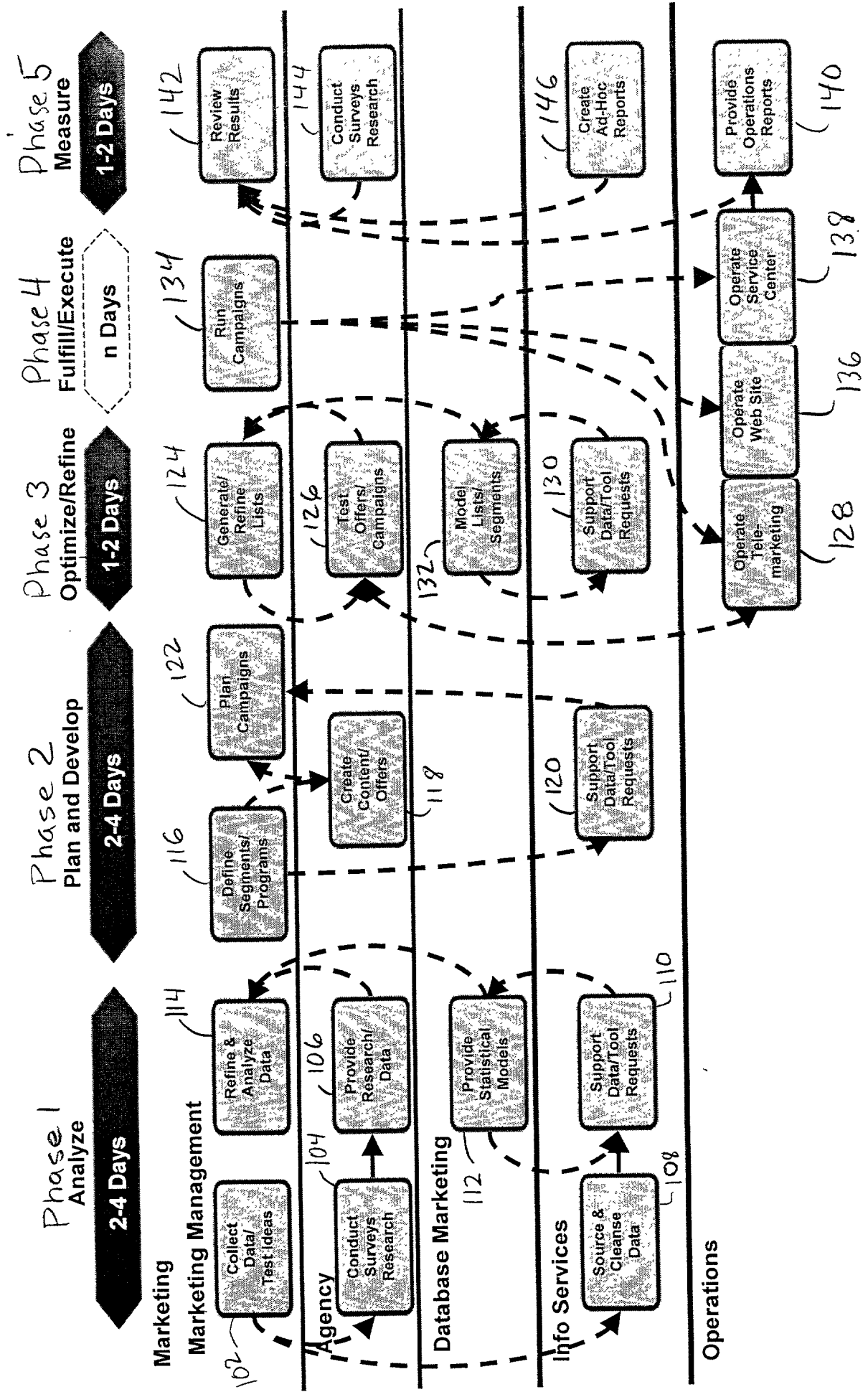


FIG. 10

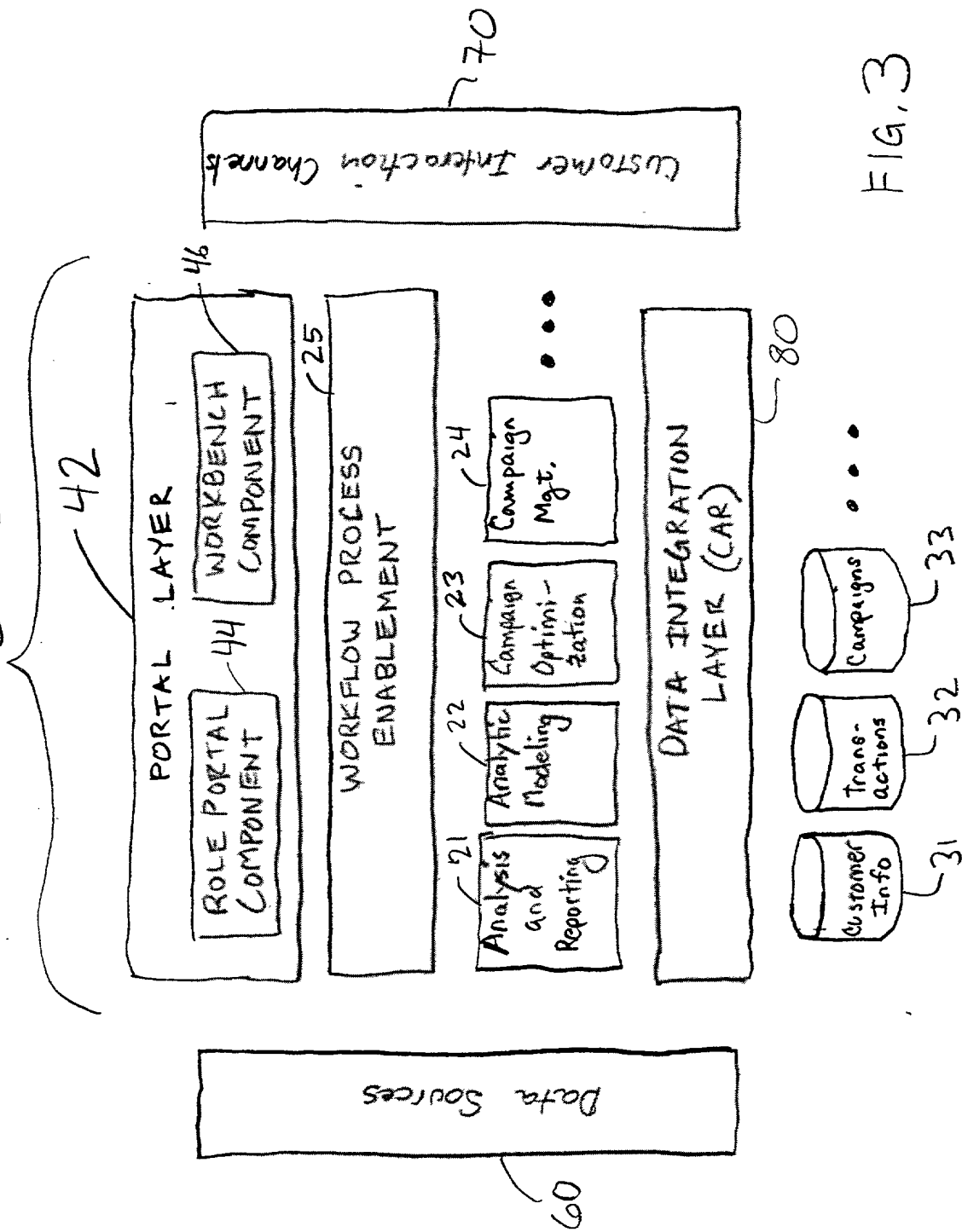


FIG. 3

FIG. 4

42

PORTAL LAYER

44

ROLE PORTAL COMPONENT

- EXECUTIVE
- MARKETING MANAGER
- DATA ANALYST

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46

WORKBENCH COMPONENT

- HOMEPAGE
 - SCORECARDS
 - TASKS (TO DO'S)
 - ALERTS
 - COMPANY NEWS
 - OTHER NEWS
 - WEBSITE LINKS
- ACTIVITIES PAGE
 - TASKS (TO DO'S)
 - RESOURCES AND REFERENCES
- MARKETING CAMPAIGNS PAGE
 - S/W APP. ACCESS
 - CAMPAIGN INFO AND METRICS
- CUSTOMER ANALYSIS PAGE
 - S/W APP. ACCESS
 - ANALYTICS

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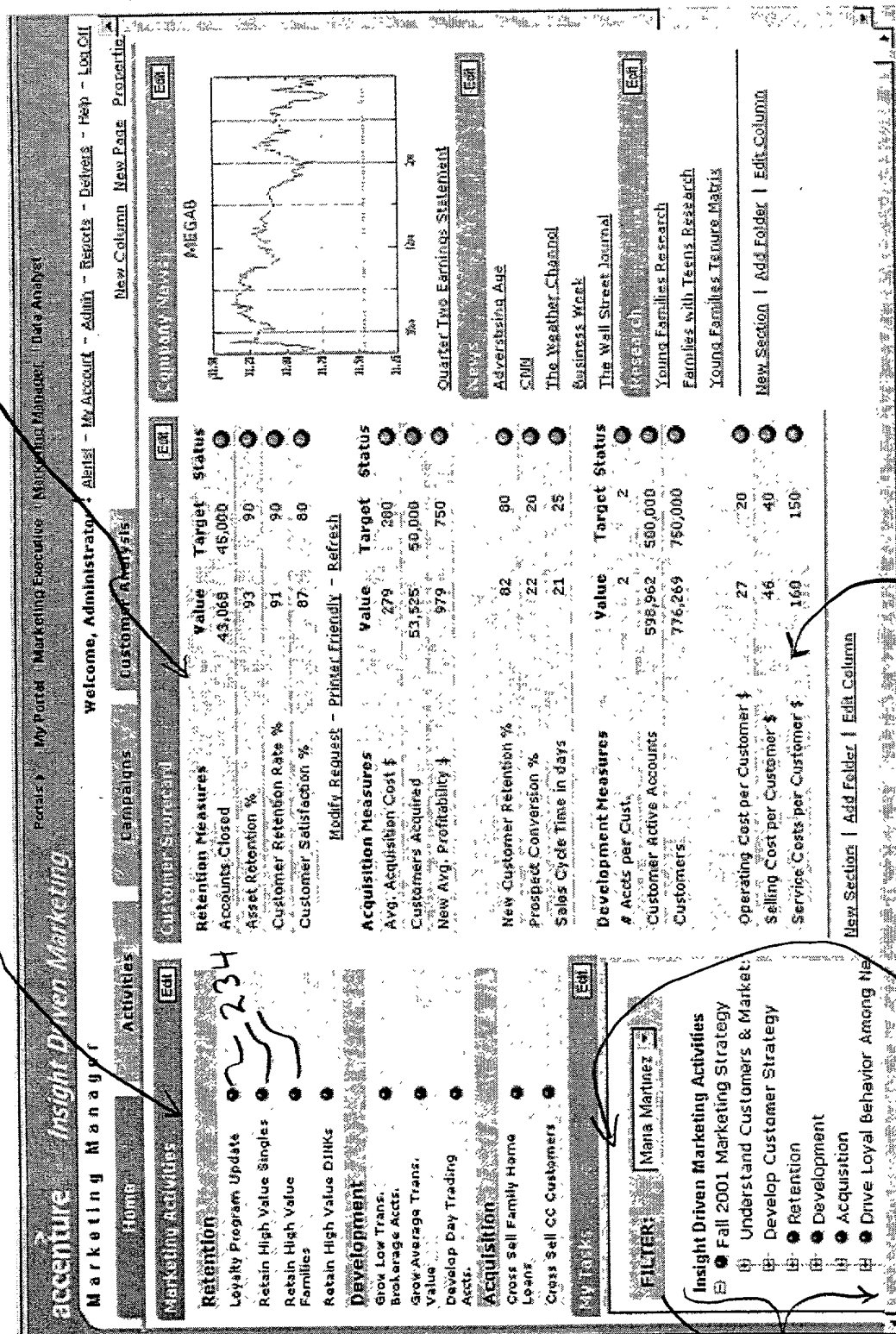
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[illegible]

033

Fig. 6



352

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350

356

432

My Portal Marketing Executive Marketing Manager Data Analyst

438

430

440

442

450

460

FIG. 7

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Insight Driven Marketing

Data Analyst

Home

Activities

Marketing Activities

Welcome, Administrator

Admin

My Account

Reports

Delivers

Help

Log Off

My Portal

Marketing Executive

Marketing Manager

Data Analyst

Retention

Loyalty Program

Update

Retain High Value

Singles

Retain High Value

Families

Retain High Value

DINKs

Development

Grow Low Trans.

Brokerage Accts.

Grow Average Trans.

Value

Develop Day Trading

Accts.

Retention

Response Rate %

Response Count

Contact Count

Campaign Description

Program Type

Acquire Young Professionals

Cross Sell Credit Card Consumers

Cross Sell Family Home Loans

Develop Day Trading Accounts

Grow Low Transaction Brokerage Accounts

Loyalty Program Update

Retain High Value DINKs

Retain High Value Families

Retain High Value Young Singles

Retain Young Families

Conversion Rate %

34.9%

40.1%

31.8%

46.0%

50.4%

39.6%

30.4%

44.9%

24.7%

10.0%

2,477,560

123,604

13,855

20,823

917,858

3,250,078

964,090

1,243,447

1,712,270

60,000

1,994,333

39,708

570

800

45,787

96,719

29,038

74,203

34,063

6,000

2.0%

5.0%

4.1%

3.8%

5.0%

3.0%

3.0%

6.0%

2.0%

10.0%

MEGAB

Quarter Two Earnings Statement

News

CNN

Weather

Advertising Age

Research

Customer Analytic Record

Brokerage Claim Model

REFRESH

NEW

ADD FOLDER

EDIT COLUMN

630

F/G. 9

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Marketing Executive | Home | Activities | Campaigns | New Column | New Page | Properties

Welcome, Administrator ! Admin - My Account - Admin - Reports - Delivers - Help - Log Off

Campaign Selection Criteria

Promo Type	Promo Description	Channel	Promo Date
(All Choices) [v]	(All Choices)	[v] (All Choices) [v]	[Select] [v]

Campaign History

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,933	39,708	2.0%	0.7%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,958	45,787	5.0%	2.5%	50.4%
	Loyalty Program Update	3,250,078	96,719	3.0%	1.2%	39.8%
Retention	Retain High Value DINKs	954,090	29,038	3.0%	0.9%	30.4%
	Retain High Value Families	1,243,443	74,283	6.0%	2.7%	44.5%
	Retain High Value Empty Nesters	1,712,270	34,063	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

Modify Request = Printer Friendly = Refresh = Download Data

New Section | Add Folder | Edit Columns

Program Type	Campaign Description	Est. ROI	Status
Acquisition	Acquire Young Professionals	8.15% 8.00%	●
	Cross Sell Credit Card Consumers	8.70% 8.00%	●
	Cross Sell Family Home Loans	13.09% 12.80%	●
Development	Develop Day Trading Accounts	10.05% 10.00%	●
	Average Grow	10.70% 10.20%	●
	Grow Low Transaction Brokerage Accounts	16.20% 15.00%	●
Retention	Loyalty Program Update	9.90% 8.50%	●
	Retain High Value DINKs	10.80% 9.50%	●
	Retain High Value Empty Nesters	12.43% 12.25%	●
	Retain High Value Families	11.90% 11.30%	●
	Retain High Value Young Singles	14.10% 14.00%	●
	Retain Young Families		●

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Marketing Manage Home Activities Campaign Management Application Launch Campaign Management Application Active Campaigns

Welcome, Administrator | Admin - My Account - Admin - Reports - Delivers - Help - Log Out

New Column New Page Properties

Program Type	Campaign Description	Est. ROI Target	Status
Acquisition	Acquire Young Professionals	8.15% 8.00%	<input checked="" type="radio"/>
	Cross Sell Credit Card Consumers	8.70% 8.00%	<input checked="" type="radio"/>
	Cross Sell Family Home Loans	13.09% 12.80%	<input checked="" type="radio"/>
	Develop Day Trading Accounts	10.05% 10.00%	<input checked="" type="radio"/>
	Growth Average Transaction Value	10.70% 10.20%	<input checked="" type="radio"/>
	Growth Low Transaction Brokerage Accounts	16.20% 15.00%	<input checked="" type="radio"/>
	Loyalty Program Update	9.90% 8.50%	<input checked="" type="radio"/>
	Retain High Value Empty Nests	10.80% 9.50%	<input checked="" type="radio"/>
	Retain High Value Families	11.90% 11.30%	<input checked="" type="radio"/>
	Retain High Value	12.43% 12.25%	<input checked="" type="radio"/>

Promo Type	Promo Description	Channel	Promo Date
(All Choices)	(All Choices)	(All Choices)	Select

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	0.7%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.8%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
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	Loyalty Program Update	3,250,878	96,719	3.0%	1.2%	39.8%
	Retain High Value Empty Nests	964,090	29,030	3.0%	0.9%	30.4%
	Retain High Value Families	1,243,443	74,283	6.0%	2.7%	41.9%
	Retain High Value Young Singles	1,712,270	34,053	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

New Section | Add Folder | Edit Column

876 882

File Edit View Favorites Tools Help

876 882

accutune Insight Driven Marketing

Data Analyst

Home Activities

Launch Analytical Modeling Tool

Add an Analytical Report

Welcome, administrator

My Account

Admin

Reports

Delivers

Help

Log Off

Portals

My Portal

Marketing Exercises

Marketing Manager

Data Analyst

Key Metrics

LifeStage Segment

Total Product Count

Products per Customer

Total Assets

Total Profitability

LifeStage Segment

Dinks

Empty Nesters

Families with Teens

Retired

Young Families

Young Singles

Demographics

LifeStage Segment

Average Age

Average Income

Average Family Size

% Married

% Male

Psychographics

LifeStage Segment

% Fitness

% Outdoors

% Travel

% Domestic

% Cultural

% Bluechip

% Div

% Technology

878

Please enter only the name of the folder of the Analytical Report that was created. (*Required Field)

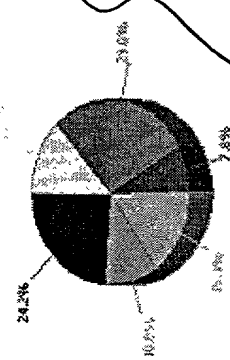
*Folder Name:
Folder Alias:
(If you would like to enter a more descriptive text for the link name)

Segment Overview

Customers by Segment

880

- Dinks
- Empty Nesters
- Families with Teens
- Retired
- Young Families
- Young Singles



886

FIG. 11

830

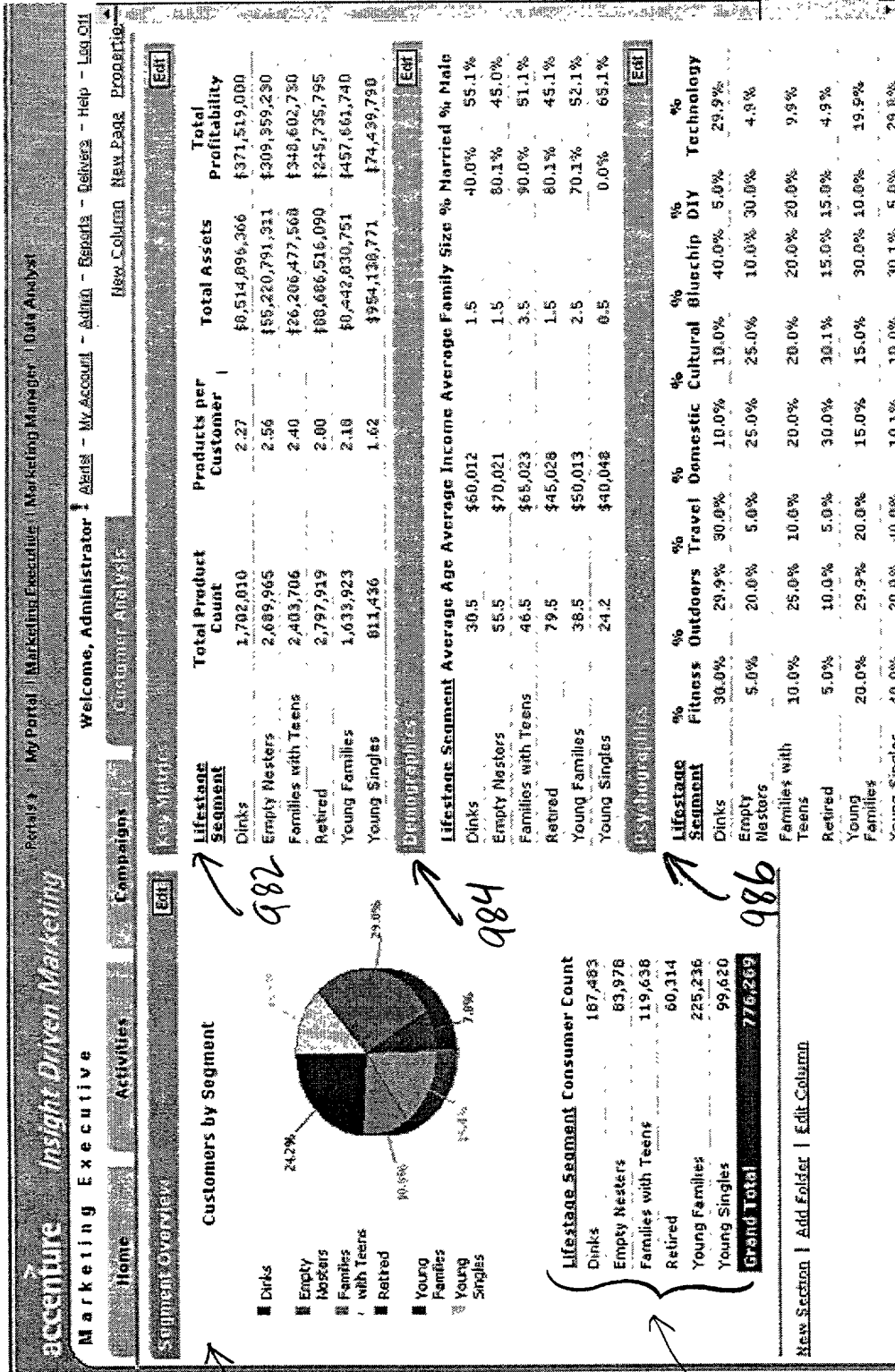
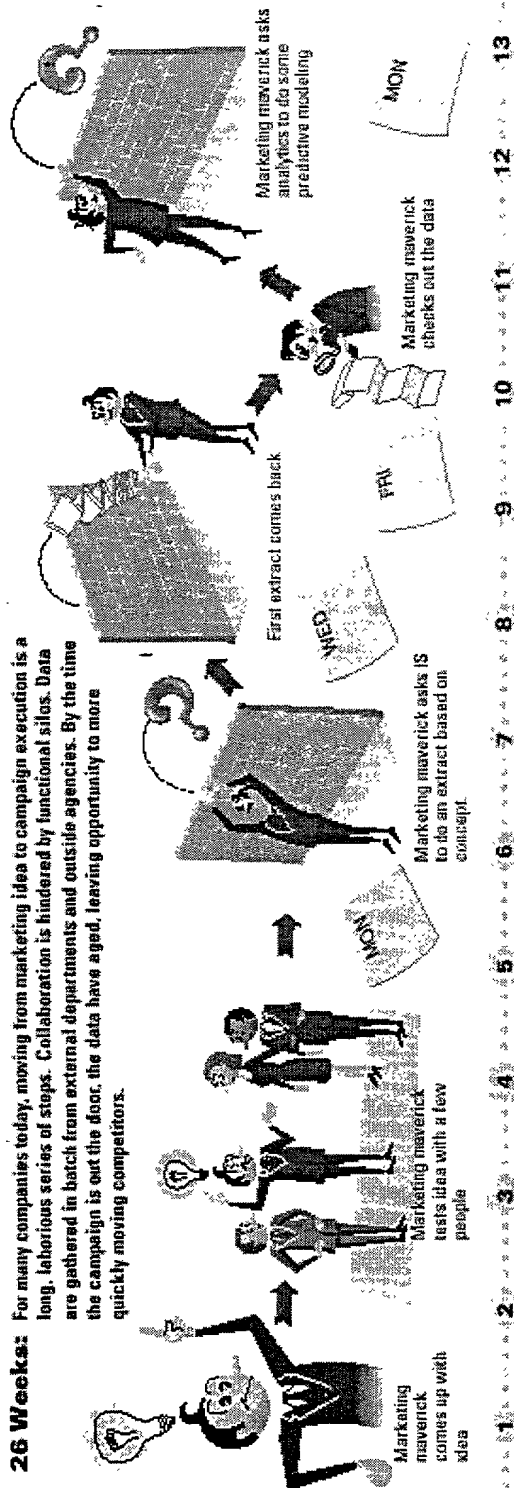


FIG. 12

ANATOMY OF A MARKETING CAMPAIGN: THEN AND NOW

26 Weeks: For many companies today, moving from marketing idea to campaign execution is a long, laborious series of steps. Collaboration is hindered by functional silos. Data are gathered in batch from external departments and outside agencies. By the time the campaign is out the door, the data have aged, leaving opportunity to more quickly moving competitors.



26 Minutes: Gathered in a quality circle, the cross-functional marketing team views analysis of real-time data, brainstorm ideas, and assigns responsibilities. With integrated tools and data at their fingertips, they are able to move quickly, employing technology to integrate customer data, content, and fulfillment to deliver the marketing campaign—getting it right the first time.

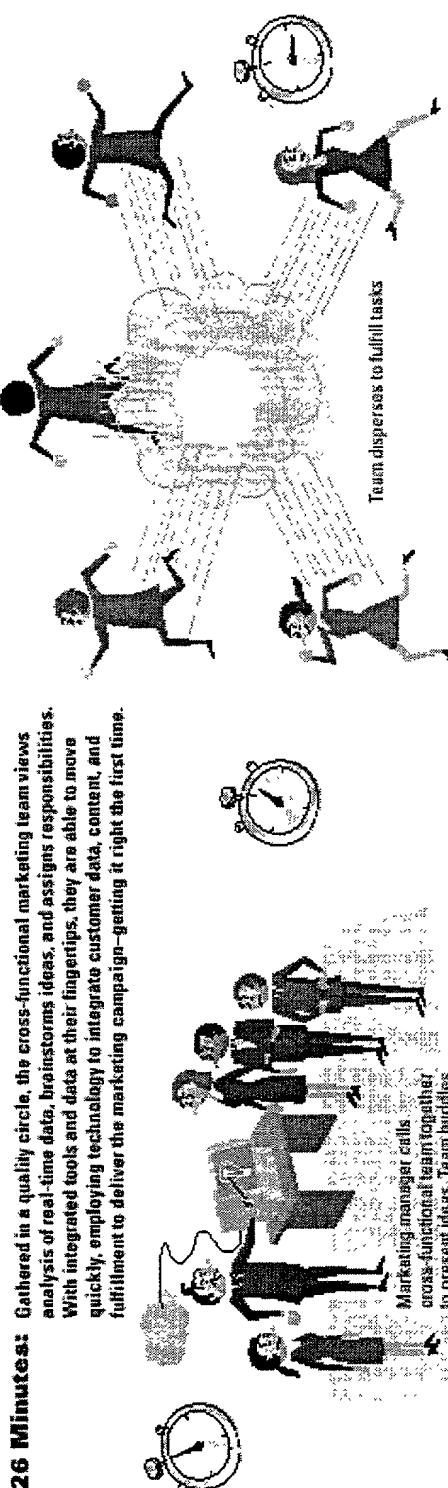


FIG. 13B

